

The following Criteria is required in order for IRS to prepare your Federal Tax Return:

- You, your spouse and any dependents must be U.S. Citizens, Resident Aliens or have a valid Individual Taxpayer Identification Number (**ITIN**)
- Returns will only be prepared for taxpayers with a total income of **\$49,000** or less
- If filing a **Married Filing Joint** return, you **and** your spouse must be present
- If filing a **Married Filing Separately** return **and** you or your spouse live in a **Community Property** state, we **CANNOT** prepare your return
- Social Security Number (**SSN**) information presented **must match** the SSN on all Wage & Income statements (i.e. Form W-2, Form 1098, Form 1099, etc.)
- If your SSN information does not match your Wage & Income statements, you will need to contact the issuer to correct those statements
- Verified ITIN taxpayers are exempt from this requirement

You must bring the following (if applicable) in order to have your Federal Tax Return prepared:

- Valid, government issued (i.e. not expired) photo identification for you and your spouse
- You and your spouse's name, address and phone number
- Copies of **ALL** Forms W-2, 1098, 1099 and the amount of any other income received by you and your spouse
- One of the following for you, your spouse and any other persons listed on your tax return:
 1. Social Security Number Card or Letter*
 2. Adoption Taxpayer Identification Number (**ATIN**) Card or Letter*
 3. Individual Taxpayer Identification Number Card or Letter*(You **must** have been issued an ITIN by IRS to qualify for e-file)
** Official Social Security Administration or IRS ITIN assignment letters are acceptable.*
- Date of birth for you, your spouse and your dependents
- If claiming the Child / Dependent Care Credit, the care provider's address and Tax Identification Number (**TIN**)
- Form 8332, Release of Claim to Exemption for Child of Divorced or Separated Parents, or copy of divorce decree if you are the non-custodial parent claiming a child as a dependent
- Proof of Account Number and Routing Number of the financial institution for a direct debit or a direct deposit of an anticipated refund into your checking and/or savings account

Additional Information:

- All current year tax returns will be electronically filed[#]
- A 5-digit Personal Identification Number (**PIN**) will be required for all e-filed returns, if applicable

[#] *1st Time Homebuyer returns requiring the new Form 5405 must be paper filed.*

Form and Schedules that IRS will prepare:

- Form 1040
- Form 1040EZ
- Form 1040A
- Form 1040X - 1040X returns **cannot** be e-filed
- Schedules A, B - Interest and Dividends; ordinary and qualified
- Schedules C-EZ
- Schedules D - Cancellation of debt income **only**; **No** business or farm expenses
- Schedule R
- Earned Income Tax Credit (EITC) - ITIN taxpayers **are not** eligible for EITC
- Schedule SE with Schedule C-EZ only
- Reduction of Tax Attributes Due to Discharge of Indebtedness (Form 982)
- Underpayment of Estimated Tax by Individuals, Estates and Trusts (Form 2210)
 - Cancellation of debt income only
- Dependent Care (Form 2441)
- Moving Expenses (Form 3903)
- Casualties and Thefts (Form 4684)
- Additional Taxes on Qualified Plans (Form 5329)
- First-Time Homebuyer Credit (Form 5405)
- Residential Energy Credit (Form 5695)
- Nondeductible IRAs and Coverdell ESAs (Form 8606)
- Additional Child Tax Credit (Form 8812)
- Exclusion of Interest from Series EE and U.S. Savings Bonds (Form 8815)
- Adoption Credit (Form 8839)
- Archer MSAs and Long-Term Care Insurance Contracts (Form 8853)
- Education Credit (Form 8863)
- Retirement Savings Credit (Form 8880)
- Health Insurance Credit for Eligible Recipients (Form 8885)
- Direct Deposit of Refund (Form 8888)
- Health Savings Accounts (Form 8889)
- Tuition and Fees Deduction (Form 8917)
- Social Security Worksheets